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Sailing through stormy weather - Macedonia and the EU in 2018

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Impressum

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Introduction

2018 was coined by many experts and EU Commission officials as the ‘year of opportunity for Western Balkan countries to take irreversible steps on their EU integration path’.¹ After years of being overlooked by the EU, there finally seemed to be sincere commitment by EU institutions to genuinely engage with the region. A number of indicators go in line with this. To begin with, at the beginning of February, the European Commission promoted the ‘credible enlargement perspective for and enhanced EU engagement with the Western Balkans’. On 17 May 2018, Sofia hosted the EU – Western Balkans Summit which had been awaited by Western Balkan leaders since the last summit in Thessaloniki in 2003. The Bulgarian presidency, followed by the Austrian presidency, placed the Western Balkans high on its agenda. And finally, in the summer of 2018, the London Summit of the Berlin Process took place.

From all countries in the region, evidently only Macedonia (in addition to Albania) was able to show resolute steps forward by closing the chapter on bilateral issues with both Bulgaria and Greece. Macedonia succeeded to find a resolution to the name dispute with Greece as well as to ratify the Friendship treaty with Bulgaria. In June the Council, however, missed the opportunity to reward this during their meeting. Yet, the Council managed to reach a consensus on a path to potentially open accession negotiations with Macedonia in June 2019 provided a ‘completion of national parliamentary procedures and the endorsement by the European Council’. Depending on progress in the area of judiciary, fight against organised crime and corruption, intelligence and security services reform and public administration reform, Macedonia (by then North Macedonia) should expect the ‘first Intergovernmental Conference by the end ▶

¹ BIRN, “Commission Sees 2018 As Balkans’ Year of Opportunity,” January 3, 2018, <http://www.balkaninsight.com/en/article/commission-sees-2018-as-balkans-year-of-opportunity-01-02-2018-1>.

► of 2019'.² Furthermore, the Council took 'note of the intention of the Commission to begin the necessary preparatory work'. In other words, the Commission gave 'green light' to start with the explanatory screening for the negotiation chapters.

In this momentous environment, IDSCS, in cooperation with the Konrad-Adenauer-Foundation Macedonia, carried out the third annual opinion poll to find out how last year's events have impacted Macedonian citizens and their perception of both domestic politics and European enlargement.

About this Survey

Since 2016 IDSCS, in cooperation with the Konrad-Adenauer-Foundation Macedonia, carries out a nationwide, representative opinion poll to analyse the public opinion on Macedonia's accession to the European Union and related domestic politics. Therefore, this 2018 public opinion analysis

is a continuation of research done in 2016³ and 2017⁴ and thus offers the opportunity to compare developments in public opinion during a longer period. The questions for this year's edition have been developed in relation to the upcoming decision in the EU Council on the start of negotiations between Macedonia and the European Union.

On the one hand, the questionnaire tackles domestic policies and asks respondents to rate areas in which Macedonia is expected to reform critically in order to prepare the country for realistic EU membership prospects. On the other hand, respondents are asked about their perception of the relations between Macedonia and foreign powers. In light of EU accession, knowledge on projects implemented by the EU in Macedonia as well as on the (financial) benefit of EU membership is polled. The results offer a comprehensive insight into the current political atmosphere in Macedonia and invite for a thorough and critical debate on

³ Zoran Nechev and Hristijan Petrushev, "The EU's Credibility at Stake in Macedonia," *Institute for Democracy "Societas Civilis" - Skopje*, February 2017, 11.

⁴ Zoran Nechev, Nenad Markovikj, and Ivan Nikolovski, "The European Union on the Verge of Bouncing Back in Macedonia," *Institute for Democracy "Societas Civilis" - Skopje and Konrad Adenauer Stiftung*, March 2018, 26. Conclusions" (Brussels: Council of the European Union, June 26, 2018).

the political climate as well as the level of information among citizens in a country striving for EU membership.

The data used in this analysis was gathered by M-Prospekt over the period December 3 and December 21, 2018, on a representative sample of 1000 respondents. The sample represents the citizenry of Macedonia in regards to gender, age (above the age of 18), ethnicity and electoral districts. Results are presented in percentages and are subject to an error rate of $\pm 3\%$.

General trends: No mood for a honeymoon

2018 has been an eventful year for Macedonia in regards to bilateral and EU relations. The year kicked off with the ratification of the "Agreement for

Friendship, good neighbourly relations, and cooperation with Bulgaria" by the Macedonian Parliament. In early spring, the EU Commission recommended the country to be considered for accession by the European Council.⁵ This encouraged further, deeper reform aspirations which were laid out by the government in the "Plan 18".⁶ Summer and autumn finally brought results in the long-going name dispute with Greece. The Prespa Agreement⁷ provided a comprehensive framework between the governments of Greece and Macedonia which included the change of Macedonia's constitutional name to "Republic of North Macedonia". This whipped up feelings in many Macedonians, and the Parliament has seen many of their sessions to be boycotted by members of the opposition party VMRO-DPMNE.

Before the government change, Macedonia had experienced high levels of state capture, accompanied by recorded ▶

⁵ See European Commission, "European Commission - Press Release - Key Findings of the 2018 Report on the Former Yugoslav Republic of Macedonia," April 17, 2018, http://europa.eu/rapid/press-release_MEMO-18-3405_en.html.

⁶ Government of the Republic of Macedonia, "Plan 18," April 2018, <http://www.sep.gov.mk/data/file/Dokumenti/Plan.18.ENG.pdf>.

⁷ Officially the "Final Agreement for the Settlement of the Differences as described in the United Nations Security Council Resolutions 817 (1993) and 845 (1993), the Termination of the Interim Accord of 1995 and the establishment of a strategic partnership between the Parties"

► corruption, clientelism and a lack of transparency on all levels.⁸ To overcome such a poisoned political culture poses a great challenge and the “democratic credentials of the new SDSM and DUI government are not much brighter”⁹. However, considerable critical research into (political) corruption and nepotism under the new Macedonian government have not been published (yet), leading to a situation in which a lack of constructive criticism may obstruct the comprehensive democratization of the country.

A deep split in the society can be observed when looking at data in regards to voting behaviour of respondents. Different perceptions of foreign influence and alliances most clearly show a gap in opinions, most probably based on highly emotionalized topics which have emerged during the bilaterally turbulent year of 2018.

No more sweet talk: rising scepticism towards the Government

With regards to the work of the Government, respondents were asked to estimate their confidence in the ability of the Government to fulfil its assigned obligations. The Government was assessed on a scale from 1 (will not fulfil at all) to 10 (will fully fulfil) in 8 different categories including the ability to politically detach the administration from any political party, to combat organised crime and corruption and to cooperate with civil society organisations despite their tendency to be critical towards government’s activities. For clearer results, the possible responses were split at the median (5) thus creating a binary variable with two categories: 1) the Government will not fulfil and 2) the Government will fulfil. Overall, respondents show a high level of scepticism towards successful delivery on issues concerning good governance. In all areas examined the

⁸ For further research see Misha Popovikj, “Demography of Corruption: Overview on „State Capture”,” Macedonian Center for International Cooperation, 2015; Ognian Shentov, Ruslan Stefanov, and Boyko Todorov, eds., *Shadow Power. Assessment of Corruption and Hidden Economy in Southeast Europe* (Southeast Europe Leadership for Development and Integrity (SELDI)), 2016).

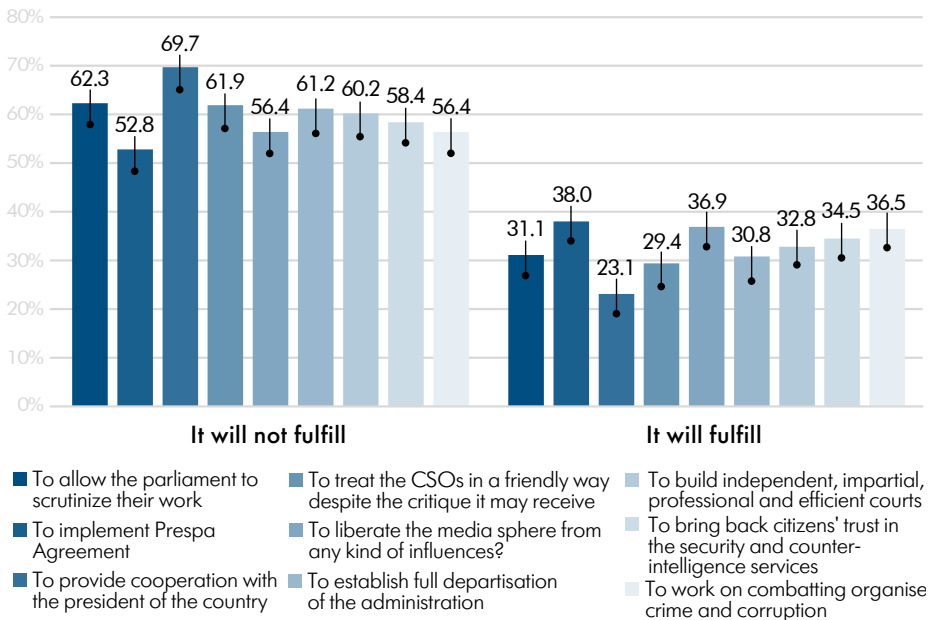
⁹ Zhidas Daskalovski, “State Capture: How to Save the Macedonian Democratic Consolidation and EU Enlargement,” Heinrich-Böll-Stiftung, Perspectives, no. 3 (September 2017): 20–25.

cumulative valid percentage of negative answers (1 to 5) outweighs the cumulative valid percentage of positive answers (6 to 10) by at least 20%.

The biggest concern is expressed towards the Government's successful cooperation (cohabitation) with the president of the country.¹⁰ Namely, 69.7% of the respondents think that the Government will not succeed to cooperate with the

president, while only 23.1% believe the opposite. A perceived lack of cooperation between state institutions is also expressed by responds to the question of whether or not the Government will allow the Parliament to scrutinize their work. 62.3% of respondents do not believe that Parliament and Government will successfully cooperate on this matter, with 31.1% expressing their confidence in a successful monitoring process. ▶

Graph 1. To what extent do you think that the government will succeed in fulfilling the following activities?



¹⁰ The parliamentary majority is formed and led by the Social Democratic Union of Macedonia (SDSM), while the president was nominated and supported by the largest opposition party - VMRO-DPMNE.

► In comparison to results from the previous year, a clear trend towards more scepticism in all fields is visible. Comparing results from the 2017 round of questioning with results from this year (2018), respondents assess the Government worse in all categories. This negative trend is supported by a clear decrease in respondents ticking the field “I don’t know/ refuse to answer”, thus more respondents than in the previous year formulate their opinions on the work of the Government.

Interestingly, the biggest increase in scepticism can be observed in the field of government attitude towards, potentially critical, civil society organisations (CSOs). While in 2017 47.5% of respondents expressed scepticism towards a friendly treatment of CSOs, this percentage rose to 61.9% in 2018 with the group of positive answers dropping from 39.3% in 2017 to

29.4% in 2018. This trend is meaningful and important. Social protest in Macedonia since 2015 onwards has been driven by deep dissatisfaction among different groups with the political system and the political culture in Macedonia.¹¹

The “Citizens for Macedonia” Initiative, a social movement which significantly influenced the political change of course in Macedonia, was comprised not only of civic activists but first and foremost of members of the then-opposition, now-governing party SDSM.¹² This led to high expectations among the SDSM electorate after the government change. Expectations were, however, vastly disappointed. Considering that the current government has been brought to power by civic activism it is worrying that the attitude towards CSOs is considered to be increasingly bad. Civil society posed the trigger for more democratisation,

¹¹ Ivan Nikolovski, “What Brings Them Together? Social Movements in Divided Societies: The Case of the Republic of Macedonia” (Central European University, 2017).

¹² Refer to Ivan Stefanovski, “Citizens for Macedonia’ – From Citizen Mobilization to Democratization?,” in *Proceedings from the International Scientific Conference (Challenges of Contemporary Society, Skopje: Institute for sociological, political and juridical research, 2015), 397-410.* <http://isppi.ukim.edu.mk/files/zbornik.pdf> (accessed 2.4.19), https://www.academia.edu/24840390/Citizens_for_Macedonia_From_Citizen_Mobilization_to_Democratization_in_Challenges_of_Contemporary_Society_-_Proceedings_from_the_International_Conference.

but signs are now indicating that the lack of recognition of civil society actors will continue.¹³ The 2017 Macedonia Report by the European Commission to other EU institutions states, optimistically, that “politics and society are undergoing significant change, with a renewed spirit of hope and openness” and that “civil society and other stakeholders are increasingly being involved in the policy-making and legislative processes.”¹⁴ The results from IDSCS 2018 opinion poll do not reflect this positive outlook.

The group of respondents who refused to answer or were unsure how to answer in 2017 visibly decreased in the 2018 public opinion pool. All categories only show an increase in scepticism though. This suggests that a rather negative experience or expectations have encouraged respondents to formulate more decisive responses in 2018.

Fishing in muddy water: knowledge on EU-related reform programmes

The questionnaire in 2018 asked participants about their knowledge of the government reform programme “Plan 18”, successor to the “Plan 3-6-9”. These plans intend to monitor the reform process in Macedonia. In light of an aspired start of EU accession negotiations, they should prepare the country for a successful screening by EU institutions. 2018 results draw a rather gloomy picture, with only 19.7% of respondents stating to have heard of the Plan 18.

This shows a decreasing trend from 2017 when participants were asked whether or not they have heard of the Plan 3-6-9. ▶

¹³ Freedom House, “Macedonia,” Country report, Nations in Transit 2017: The False Promise of Populism (Freedom House. URL https://freedomhouse.org/sites/default/files/NIT2017_Macedonia.pdf (accessed 2.4.19), 2017).

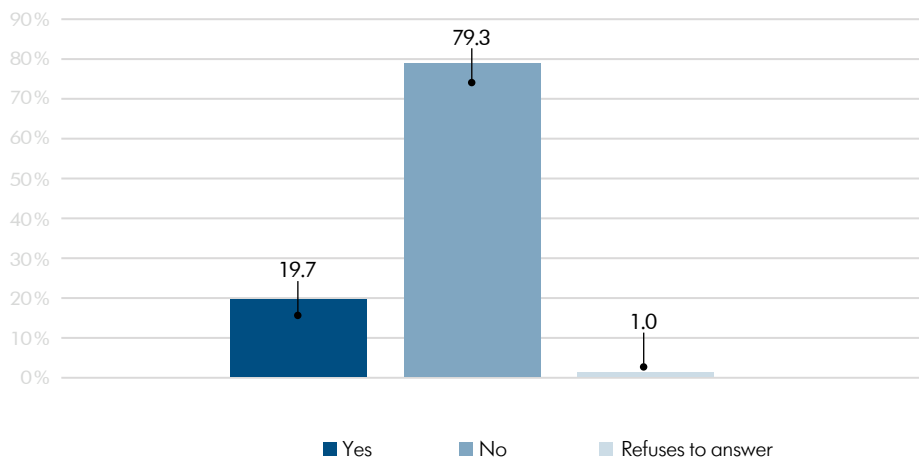
¹⁴ Freedom House, “Macedonia,” Country report, Nations in Transit 2017: The False Promise of Populism (Freedom House. URL https://freedomhouse.org/sites/default/files/NIT2017_Macedonia.pdf (accessed 2.4.19), 2017).

► 47.8% of Respondents stated to have heard of this plan. However, concerning the 2016 question on the Priebe (1) Report (a recommendation package for systemic reforms in Macedonia) the 2018 trend is repeated with only 15.8% respondents knowing about the existence of such a report. The low levels of knowledge about both the Priebe Report and Plan 18 reflect the lack of consistent and updated information and regular, comprehensive reporting on the progress. These three plans/ reports can be considered to be

among the most significant reform triggers leading towards Macedonia's EU accession. The lack of knowledge among the citizenry of the country is alarming and calls for a renewed and more transparent culture of communicating the Government's reform plans and process.

In order to get a clearer picture, respondents are categorised in different groups. This report analyses results concerning the voting behaviour of respondents¹⁵ as well as their ethnic background. Both in 2017

Graph 2. Have you heard about Plan 18?

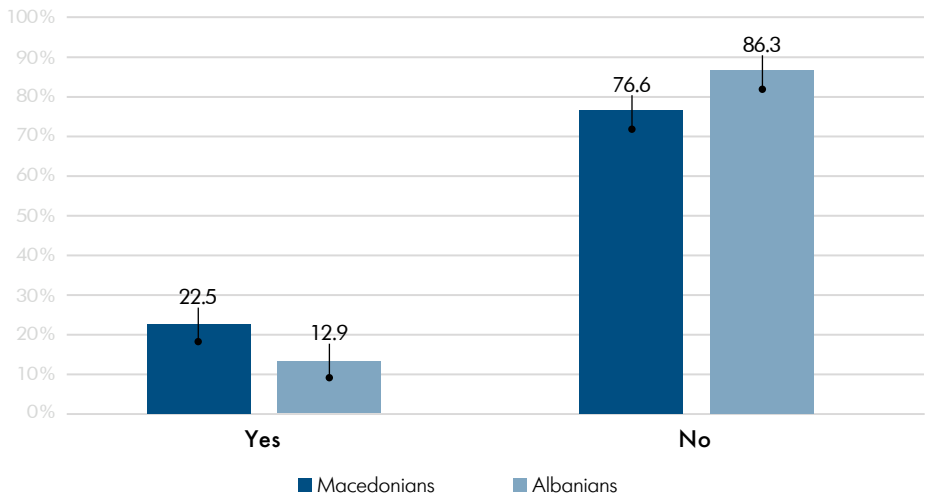


¹⁵ The voting behaviour is measured through two categories: 1) How did you vote in the 2016 parliamentary elections and 2) How will you vote in the next parliamentary elections. Results do not show significant differences between the two variables and are therefore merged into one variable in the following analysis.

and 2018 knowledge about the reform plans is considerably higher among ethnic Macedonians than among ethnic Albanians. However, in regards to voting behaviour, voters of the opposition party VMRO-DPMNE have more knowledge about the lesser-known, less transparently communicated Plan 18 than about the better-communicated Plan 3-6-9. The reverse result is seen in respondents who support the governing parties SDSM and DUI. It is worrying to see that the Government fails to successfully

communicate their programmes and policies to their electorate. Other studies carried out by IDSCS show that supporters of SDSM show much stronger affinity towards the EU and are more likely to support EU membership than their VMRO-DPMNE counterparts.¹⁶ This means that – despite a pro-European position – SDSM and DUI supporters lack significant information on the conditions under which EU accession is probable. ▶

Graph 2.1 Have you heard about Plan 18? (ethnicity)



¹⁶ For detailed information refer to Ivan Damjanovski, "Analysis of Public Opinion on Macedonia's Accession to the European Union (2014-2017)," *The Konrad Adenauer Stiftung in the Republic of Macedonia and Institute for Democracy "Societas Civilis" – Skopje*, March 2018, 3–29.

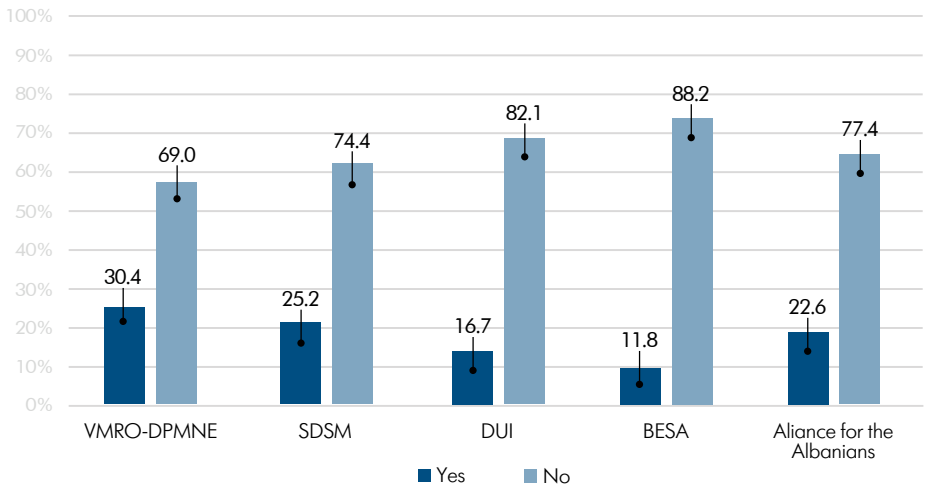
► Even in light - or because - of an apparently rather low knowledge about certain governmental programmes, respondents tend to show little trust towards the Government's success rate in implementing certain policies and/ or reforms. In 2017, 45.3% of respondents did not believe that the Government could convince the Parliament to adopt the Law on the Use of Languages (which aims at officially introducing Albanian as a second official language in Macedonia) and in 2018 52.8% of respondents believe that the Government will fail to implement the Prespa Agreement.

Quite insightful is the 2016 response to the question whether respondents believed the recommendations from the Priebe (1) Report¹⁷ to be implemented. Remembering that only 15.8% stated to have heard of this report, it strikes strangely that as

many as 39.4% of respondents have an opinion on the implementation of these recommendations. 15.3% of respondents state that they have not been implemented at all and 24.1% believe these recommendations to have been implemented at least partly. This result hints that, despite a lack of information, respondents still tend to have a – potentially uninformed and merely presuming – opinion on relevant political reforms. The EU accession process runs the danger – before it has even begun – of not being as inclusive and transparent as it should be, but instead of manifesting polarization as shown in the controversies concerning the Prespa Agreement. Research has shown that only 3% of respondents have read the Prespa Agreement which means that the majority of citizens base their opinion on second-hand knowledge and are an easy

¹⁷ Macedonia: Recommendations of the Senior Experts' Group on systemic Rule of Law issues relating to the communications interception revealed in Spring 2015

Graph 2.2. Have you heard about Plan 18? (How will you vote in the next parliamentary elections)



target for manipulation.¹⁸ No knowledge of important political processes and reforms is bad – false knowledge, however, is dangerous.

However, opposite to the scepticism regarding the questions from 2017 and 2018, almost a quarter of respondents show an optimistic attitude towards the capacities of the Government in 2016.¹⁹ ►

¹⁸ Aleksandar Kržalovski, "Referendum 2018," Macedonian Center for International Cooperation, August 2018, http://www.mcims.mk/images/docs/2018/referendum-2018-public-opinion-poll-in-macedonia.pdf?fbclid=IwAR2LMq3wMQcCdsjipDZlZQqga4XXFZglzcZFp8RfCi69ByHtdWg2W3iJ_oU.

¹⁹ The 2016 data was gathered in December 2016. On December 11th, 2016 parliamentary elections were finally held after a tumultuous year in domestic politics. The parliamentary elections saw a clear shift in power between the then-governing party VMRO-DPMNE and the biggest opposition party SDSM.

The EU: a white knight for Macedonia?

The perception of the perceived impact of the European Union on rule of law and aspects of governance in Macedonia is of particular interest for this study. Respondents were asked to rate the impact the accession process will have on the judiciary, the implementation of legal acts and the misuse of power in public offices. Respondents were asked to rate the impact of the potential EU membership on rule of law in the country through four categories (1 - it will significantly contribute, 2 - it will have a considerable impact, 3 - it will have a minimal contribution and 4 - it will not contribute at all). Again, the original variables with four categories were split around the median, thus creating new variables with two categories 1) it will

contribute and 2) it will not contribute. Respondents regard the impact of the EU with visibly less scepticism than that of their own government. 60.1% believe that EU membership will improve the situation in the judiciary, 57.7% regard EU membership as a helpful pressure on the government to implement and respect laws and 52.9% consider EU membership to prevent official misconducts. In comparison to results from 2017, mixed results appear. While there has been a clear increase to consider EU membership as positively impacting the situation of the judiciary (from 46.3% in 2017 to 60.1% in 2018), a small shift appears in regards to official misconducts.

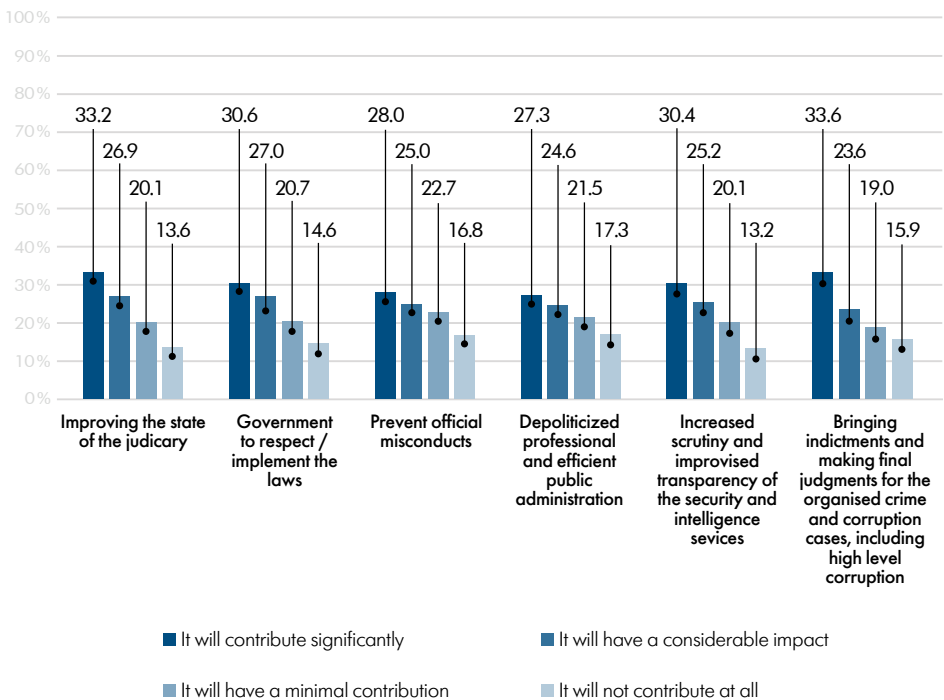
In comparison to results from 2017, mixed results appear. While there has been a clear increase to consider EU membership as positively impacting the situation in the judiciary (from 46.3% in 2017 to 60.1% in 2018), a small shift appears in regards to official misconducts. From 56.7% in 2017 the result drops to 52.9% in 2018. The

²⁰ For detailed information refer to Government of the Republic of Macedonia, "Program of Government 2017 - 2020," 2017, 20, https://vlada.mk/sites/default/files/programa/2017-2020/Programa_Vlada_2017-2020_ENG.pdf.

increased distrust in official misconduct prevention may be a result of the perceived wrongdoings and corruptive practices of government officials. Despite the promise to build a “responsible, transparent and accountable government”,²⁰ several legal offenses by high government officials

were unmasked. The escapes of former Prime Minister Nikola Gruevski and other persecuted former officials did not help the reputation of the Macedonian criminal prosecution but solidified the impression that high officials enjoy impunity notwithstanding their misdemeanour.

Graph 3. EU membership’s perceived impact on the Rule of Law



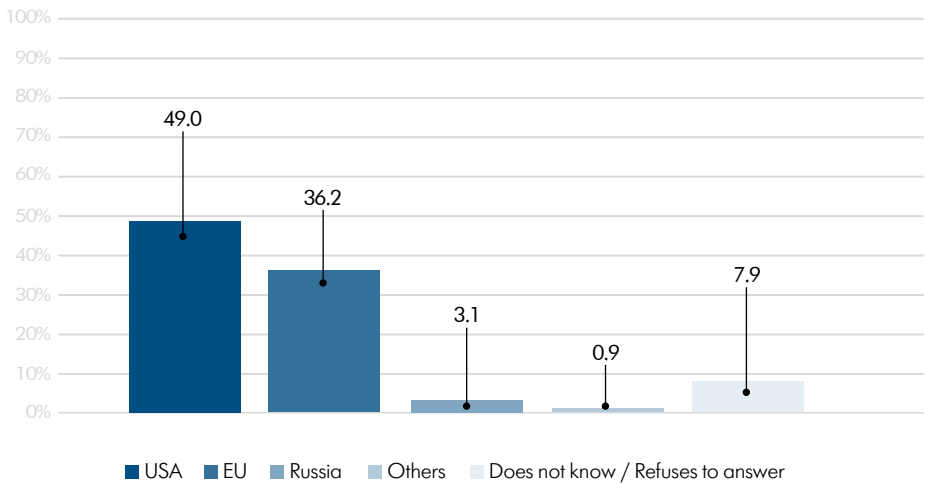
Who got their hands in the game? Foreign Factor Influence on Macedonia

Considering aspects of foreign relations, respondents were asked to choose both the most influential foreign factor in Macedonia, the biggest ally of the country and the biggest donor.

While the EU clearly takes on a leading role both as Macedonia's greatest ally

(37.9%) and as the country's biggest donor (47.5%), the US precedes when it comes to foreign influence on the country (49%). Comparison to studies from recent years shows that ranks have changed little in terms of frontrunners, but that ratios have shifted. While initially the US was clearly perceived as the most influential foreign factor by a distance, the EU caught up in 2017, only to again be perceived as considerably less influential than the US in 2018. While Russia took place 4, right after Turkey on place 3 in 2016, their perceived influence dwindled near to irrelevance throughout 2017 and 2018.

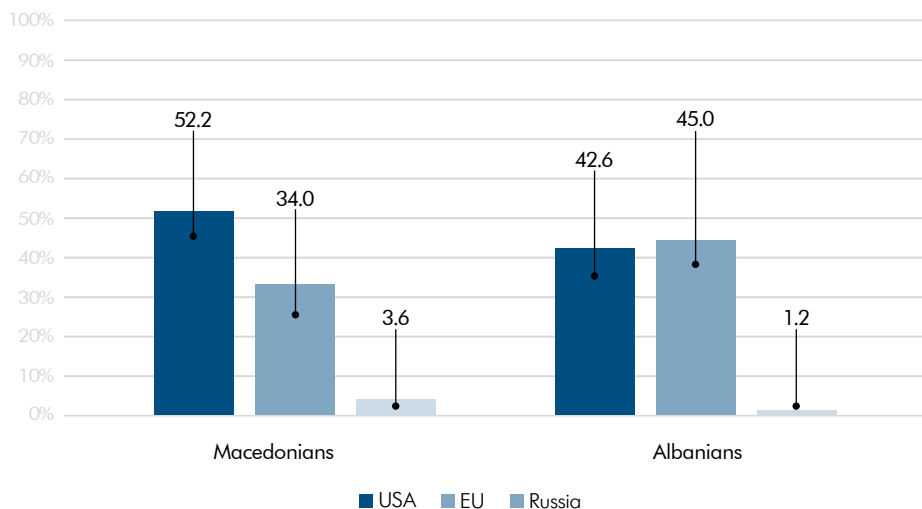
Graph 4. Which foreign factor has the greatest influence in Macedonia?



Differentiating between respondents of different ethnic background, throughout the years Albanians seem to be generally more drawn towards the European Union than ethnic Macedonians. In 2018 Albanians even consider the European Union to be slightly more influential than

the USA. While in 2016 it was barely possible to distinguish between the two ethnic groups, since 2017 onwards a clear trend is visible in such as that Albanians perceive the EU to be more influential than the US with their Macedonian counterparts assessing the opposite.

Graph 4.1. Which foreign factor has the greatest influence in Macedonia (ethnicity)?



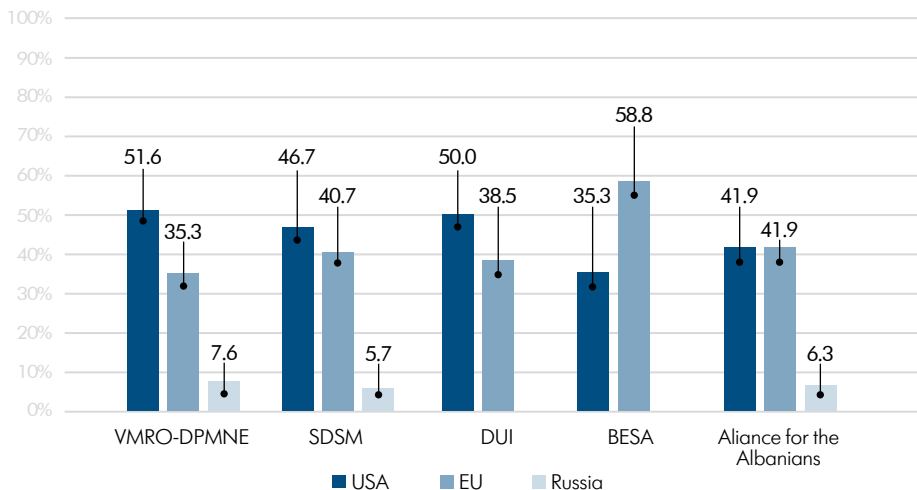
Among respondents supporting VMRO-DPMNE, the US is generally considered to be more influential than the European Union. The EU is considered to be most influential among respondents supporting

the party BESA, while the biggest drop in the perception of the EU as the most influential foreign factor can be observed among supporters of DUI (from 51.9% in 2017 to 36% in 2018). ▶

► When speaking about foreign influence, it is interesting to see that Russia is not considered to have a big influence on the country, and their perceived influence even drops from 6.2% in 2016 to 3.1% in 2018. This perception poses interesting questions with regards to the alleged meddling of Russia in Macedonian-Greek issues in 2018, leading to a diplomatic conflict between Greece and Russia²¹ which later had a spill-over effect on Macedonia as well.

While voters of all parties do not consider Russia to be very influential in 2018, results reveal a shift in 2018 with voters of VMRO-DPMNE, SDSM and the Alliance for Albanians considering Russia to be slightly more influential, while the response rate among voters of DUI and BESA drops to 0%. Even though, as the following paragraph will reveal, Russia is considered to be a very important ally, especially by voters of VMRO-DPMNE, nobody considers the country to have any meaningful influence.

Graph 4.2 Which foreign factor has the greatest influence in Macedonia? (how will you vote in the next parliamentary elections)



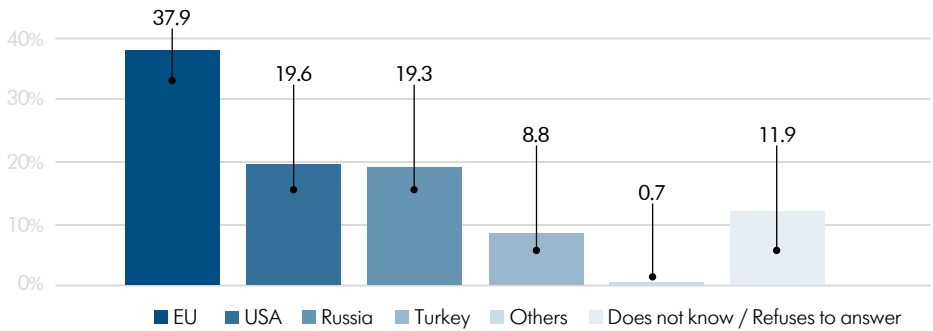
²¹ For further reference and a detailed analysis of Russian influence in the Western Balkans, and Macedonia in particular, please refer to Dimitar Bechev, "Understanding Russia's Influence in the Western Balkans," *Hybrid CoE*, September 2018, <https://www.hybridcoe.fi/wp-content/uploads/2018/10/Strategic-Analysis-2018-9-Beshev-.pdf>.

Macedonia's greatest Ally

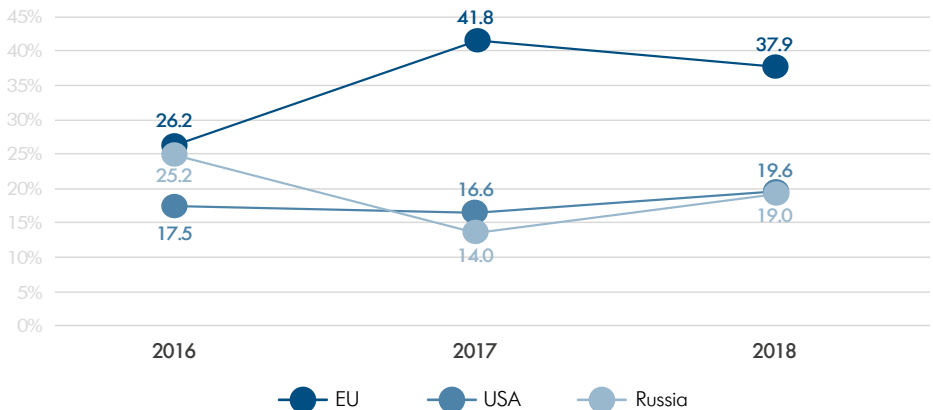
Considering influence and alliance, interesting results appear. The EU clearly leads the figures in 2017 and 2018. In 2016 the EU (26.2%) was close up with

Russia (25%). This changed swiftly in 2017, when Russia's account dropped to 13.8%, only to grow again in 2018 to 19.3%. ▶

Graph 4.3. Which country would be Macedonia's greatest ally?



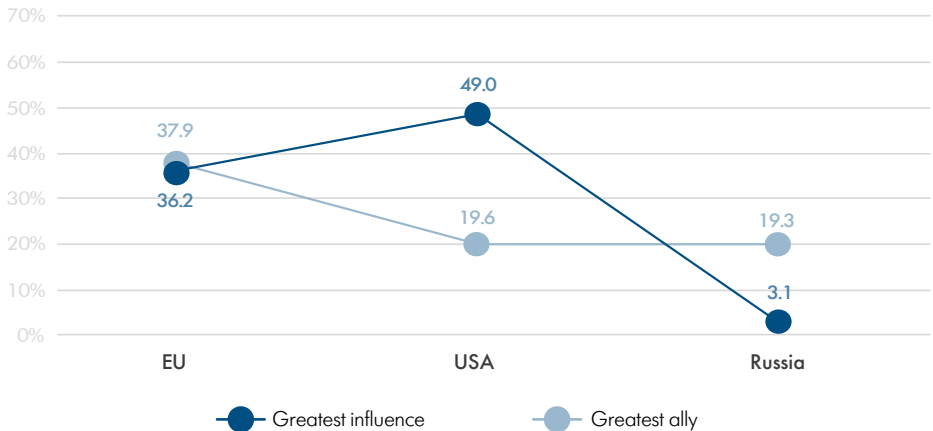
Graph 4.4. Which country would be Macedonia's greatest ally? (2016-2018)



► The data demonstrates how differently citizens perceive foreign influence on the one hand and foreign alliances on the other hand. As the data clearly shows, the USA has held the first place for three consecutive years when it comes to the perceived influence in the country.

However, respondents have ranked it only second or third when asked to choose Macedonia's greatest ally. The same conclusion applies to Russia. Whereas its influence is usually ranked third, Moscow is either perceived as the first or second greatest ally of the country.

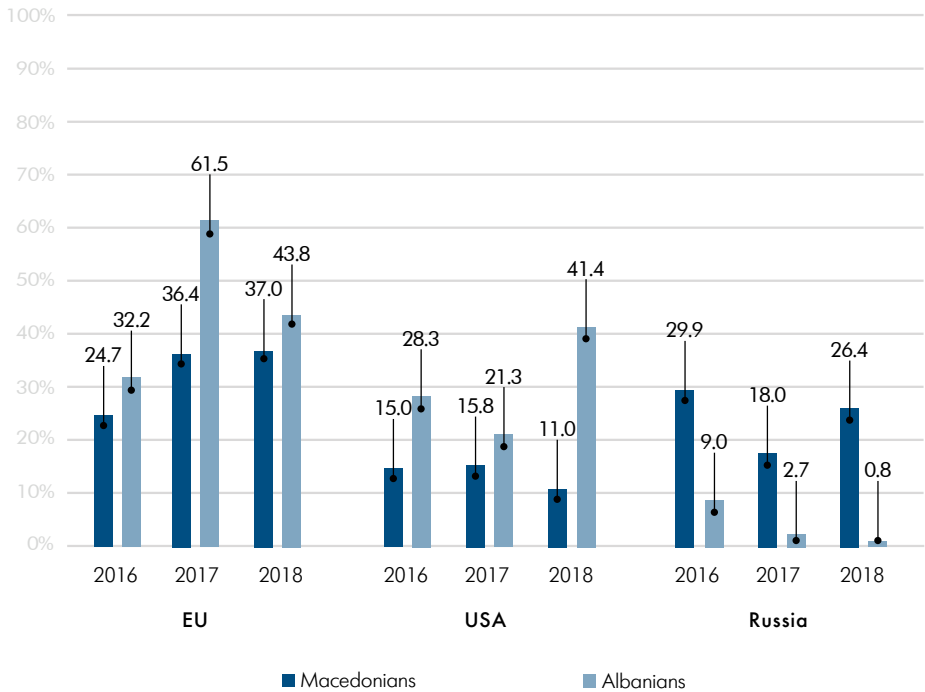
Graph 4.5. Foreign factor with the greatest influence and Macedonia's greatest ally (2018) compared



In this context, ethnic Macedonians show a clear tendency to consider Russia as a greater ally. In 2016, Russia is even considered to be the greatest ally among this group of respondents (29.9%), while only a small percentage of Albanians (9%) would agree. Both ethnic Macedonians

(18%) and ethnic Albanians (3%) consider Russia to be less of an ally in 2017. Russia's reputation recovers among ethnic Macedonians in 2018 and grows back to 26.4%. At the same time, the value drops to 0.8% among ethnic Albanians.

Graph 4.6. Which country would be Macedonia's greatest ally? (ethnicity 2016-2018)



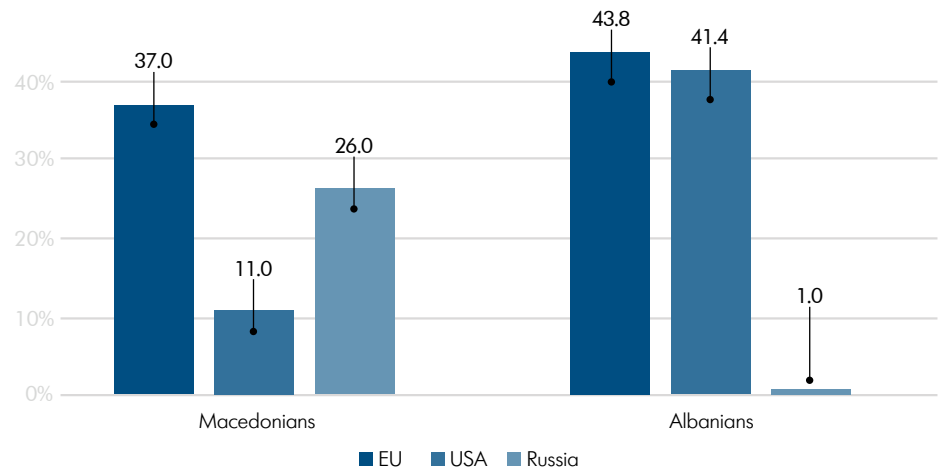
An interesting tendency is the affinity for the EU expressed by ethnic Albanians. In 2016 and 2018 the EU and the US are fairly equally considered to be the greatest ally, in 2017 however a steep increase in favour of the EU becomes visible. Following the political upheaval of 2016, the European Union clearly presented support for progressive politics

in Macedonia including a more inclusive language and minority policy. This might have encouraged many ethnic Albanian respondents to consider the EU as their greater ally. Disheartened by a lack of deliveries in these fields respondents might have changed priorities in which the traditional power of the US seems – again – more promising for some. ▶

► Speaking about voting behaviour, supporters of the governing party SDSM show an unambiguous tendency to consider the EU as their greatest ally (51.7% in 2017 to 56.5% in 2018), even bigger is the support among supporters of BESA (69% in 2017), this value drops to 52.9% in 2018, still leaving the EU to be frontrunner in this category. Among supporters of the opposition party VMRO-DPMNE, a clear change happened between 2017 and 2018. The EU, with 30.7% considered to be the greatest ally in 2017, falls down to 24.5% giving the front position to Russia. Responds in favour of Russia as the greatest ally grow from 23.4% in 2017 to 41.3% in 2018. This

shows a clear rejection of EU policies among the VMRO-DPMNE electorate and a (re-)orientation towards Russia as a strong ally of their programme. The conservative electorate of VMRO-DPMNE has strong emotions concerning the current name change of the country to “Republic of North Macedonia”. The Foreign Ministry and several Russian officials have made it clear on different occasions that they do not consider the referendum regarding the name change during September 2017 as valid²² due to the low turnout resulting from a boycott campaign by, among others, VMRO-DPMNE. Furthermore, the official stance of Russia remains to object any name change.

Graph 4.7. Which country would be Macedonia’s greatest ally?(ethnicity)

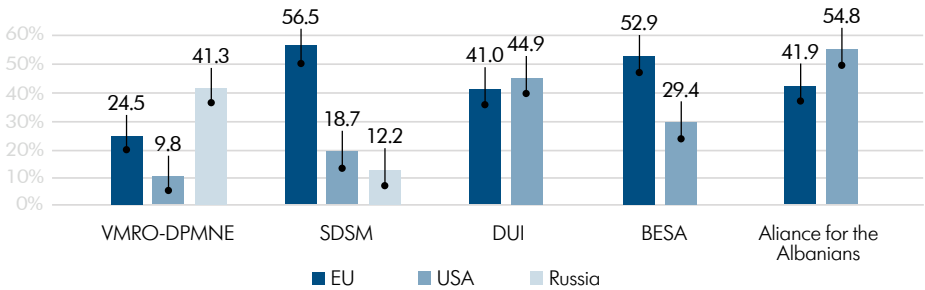


²² The Ministry of Foreign Affairs of the Russian Federation, “Comment by the Information and Press Department on the Results of Macedonia’s Referendum,” October 1, 2018, http://www.mid.ru/maps/mk/-/asset_publisher/Bx1lWHr8ws3J/content/id/3363368.

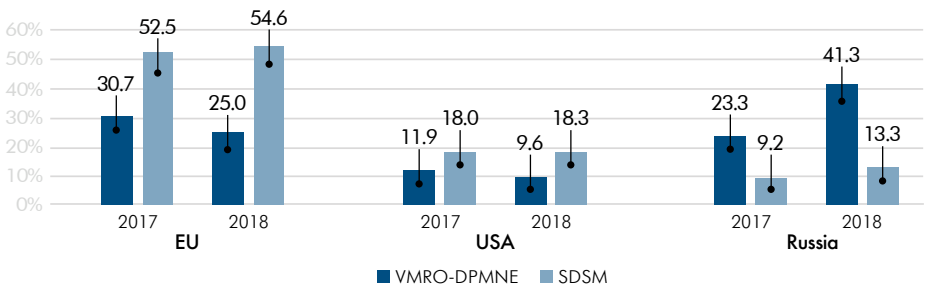
Contrary to this, Russia is not perceived as an ally at all - by the Albanian parties DUI, BESA and the Alliance for Albanians. Russia still enjoyed some slight recognition as an ally in 2017, but among

the electorate of all three parties this value dropped to 0% in 2018. The winner here is the US who is even considered to be a greater ally than the EU among voters of DUI (44.9%) and the Alliance for Albanians (54.8%).

Graph 4.8. Which country would be Macedonia's greatest ally? (how will you vote in the next parliamentary elections?)



Graph 4.9. Which country would be Macedonia's greatest ally? (how will you vote in the next parliamentary elections 2017 - 2018)

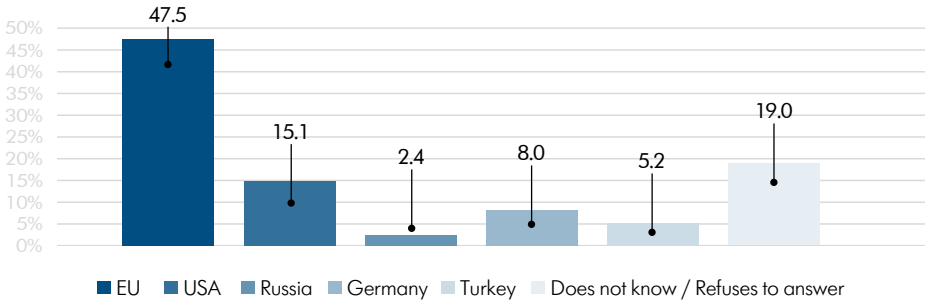


Macedonia's Biggest Donor

Speaking about Macedonia's biggest donor, a clear majority perceives the European Union as the biggest donor, with

a growing tendency from 2017 (42.8%) to 2018 (47.5%). In general, these graphs show a rather stable picture.

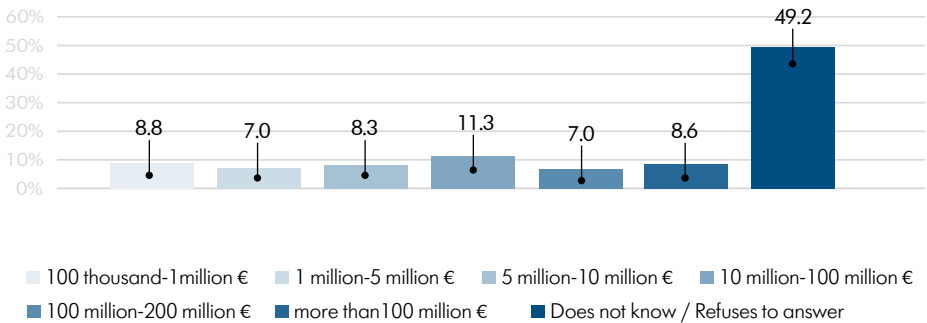
Graph 5. Which country is the biggest donor (gives most money) in Macedonia?



More telling is the question of how much money the EU actually invests in Macedonia annually. While respondents have very mixed opinions regarding the exact sum Macedonia receives annually by the European Union with only 10 Million to 100 Million peaking out of

the options (11.3% respondents) the two-year trend shows that almost 20% respondents more decide to respond to this question. This suggests that, overall, respondents feel better informed about the activities and investments of the European Union in their country.

Graph 6. How many euros per annum do you think that the EU invests in Macedonia?



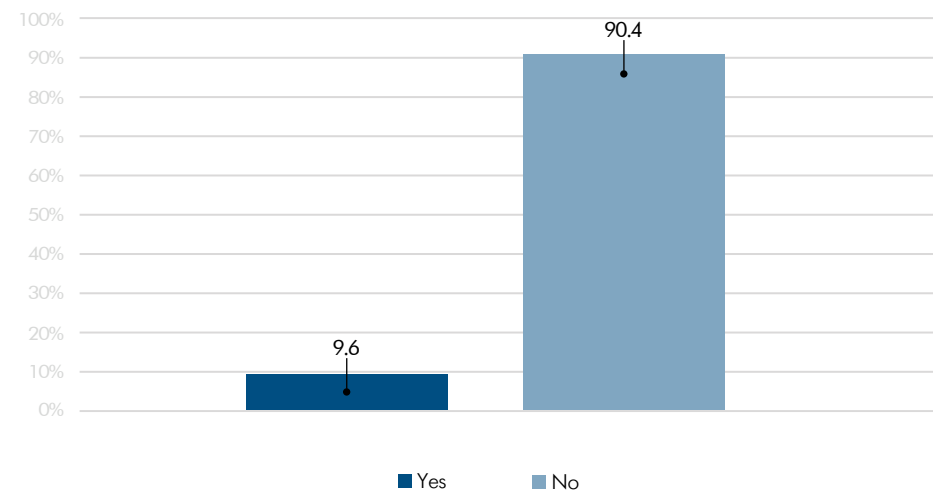
For 2014 to 2020 financial framework € 664.2 million²³ are allocated by the EU to Macedonia. The money from the EU is invested in different priority areas such as rule of law (anti-corruption, judicial reform etc.) and fundamental rights (e.g. protection of the rights of minorities such as the Roma and LGBTI community), environment and climate action, transport, social development, and rural development.

This year's public opinion poll included a new question aimed at analysing EU's visibility on the local level. Respondents

were asked whether they had heard about an EU project that is being implemented in their municipality.

Results are alarming with only 9.6% of respondents indicating that they had heard about EU investments. 90.4% of the respondents answered that they had not heard about an EU-funded project. Just a quick research can give insight into the extensive investment of the EU in all regions of Macedonia such as the construction of a Waste Water Treatment Plant in Prilep (€7.888.904,4) or Radovish Municipality (€5.123.159,38), the ►

Graph 7. Have you heard about an EU project that is being implemented in your municipality?



²³ European Neighbourhood Policy And Enlargement Negotiations, "The Former Yugoslav Republic of Macedonia - Financial Assistance under IPA II," Text, European Neighbourhood Policy And Enlargement Negotiations - European Commission, December 6, 2016, https://ec.europa.eu/neighbourhood-enlargement/instruments/funding-by-country/former-yugoslav-republic-of-macedonia_en.

- ▶ improvement of the Wastewater Collection Infrastructure in Skopje (€9.680.140,7) as well as the renovation of Skopje Railway Station (1.547.888,22)²⁴ and constructions of new motorway sections in all municipalities of Macedonia.

The lack of knowledge clearly shows that the EU who invests in all regions of Macedonia and particularly in the fields of rural development and infrastructure has so far not succeeded to communicate their investment in the country properly. If Macedonia is to become a new member of the European Union it should be high up on the priority list to communicate to the citizens of Macedonia what exactly EU membership brings, as well as what it demands. If this is not given mistakes from former enlargement rounds – including the perception of EU accession to be highly technocratic and elite-driven – will inevitably be repeated. Macedonia can, however, only become a valuable member of the European Union if not only reform efforts are supported by concrete action, but also if Macedonian citizens are included in the enlargement and integration process as responsible and well-informed stakeholders.

Conclusion

2018 was a year which saw foreign affairs high up on Macedonia's political agenda. However, the success of the Prespa agreement led towards increased polarization in the Macedonian society which is reflected in this report especially when regarding the renewed affinity a foreign actor like Russia enjoys among the Macedonian population. The events and priorities on the foreign agenda of the country have obviously led to re-considering aspects of foreign relations among all respondents.

This report revealed an increasingly high scepticism towards the Macedonian Government when it comes to domestic issues. If the Government would also fail to deliver on foreign policy promises – namely to start EU negotiations – this could possibly lead to snap elections. NATO membership alone is not a sufficient reward for the efforts and political courage to resolve the long-standing bilateral dispute with Greece. Generally, the EU enjoys a continuously high reputation,

but this is no reason to sit back and relax. A lack of positive outcomes and a decision to start accession negotiations with EU this year could have detrimental consequences to the existing EU narrative in the country and the newly sparked enthusiasm for EU membership.

Over the past year, the Government has claimed that the majority of their efforts and resources are allocated to resolving the name issue. This excuse to shy away from domestic reforms does not fly any more. The societal thirst for deep reforms which will eventually dismantle the captured state is real and will not fade away any time soon. Rising scepticism towards the Government is becoming evident, notable from the civil society itself. The current Government came in power following the social protest driven by deep dissatisfaction among different groups with the political culture exercised in Macedonia, but fails to live up to expectations so far.

Together with the growing dissatisfaction with the Government, a certain idealization of the transformative power of the EU can be observed. There is a widespread

societal support for EU driven reforms and the EU integration process is regarded as the key instigator of reforms. This support of EU membership is however not at all backed by knowledge of relevant political reforms or the actual impact the EU already has on the country. All data point towards a worryingly low percentage of informed citizens. This clearly shows that more efforts are needed from the EU and the Macedonian Government to take citizens on-board the EU integration process and to encourage an inclusive debate within the country.

Concluding the findings, there is now an urgent need for action. The Macedonian Government must show more commitment to the EU reform agenda; and the EU needs to ensure increased visibility on the ground and strategically communicate the milestones in the EU accession process.

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The KAS is a political foundation, closely associated with the Christian Democratic Union (CDU) of Germany. We conduct education programs for the society and cooperate with governmental institutions, political parties, civil society organizations and handpicked elites, building strong partnerships along the way. Together with our partners, we make a contribution to the creation of an international order that enables every country to develop in freedom and under its own responsibility.

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and Marie Jelenka Kirchner

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